

# **Firefighters' Pension Scheme 2015**

**For transfers from pension schemes outside the 2015 Scheme**

## Transferring benefits into the Firefighters' pension scheme 2015

If you are an active member, you may have previous pension benefits you wish to transfer into the Fire pension scheme. Transfers must usually be made within your first year of membership in your current employment. This includes transfers from Personal pension schemes and transfers from Public Sector schemes belonging to the Public Sector Transfer Club. Under Scheme regulations, after the first 12 months of membership, transfers into the Firefighters' Pension Scheme 2015 can only be accepted from Occupational pension schemes and on Non-Club terms.

To investigate transferring previous benefits from outside the FPS please follow the instructions below.

### Note:

- If your transfer is from a Club pension scheme e.g. Teachers' Pensions, NHS, Civil Service, Police, LGPS, you must contact us before completing these forms.
- If you have previous FPS membership with another Fire Authority, do not use this form. Instead, please complete and send a membership option form to us.

1. Read this booklet and complete the transfer form that is at the end. Send Part A and Part B to your **previous** pension provider.



2. Your previous pension provider will send details directly to you. Send **all** of them including any discharge forms to Pension Services – the address is on page 3.



3. Pension Services will send you an estimate of the extra service or pension amount your transfer will buy.



4. If you wish to go ahead with the transfer, send all the documents we have ticked on the estimate checklist to your previous pension provider.



5. When we receive payment from your previous provider, we will send you a notice of the service or pension amount awarded.

### **What must I do?**

Ask your previous pension provider for information. You can use the form in this booklet; complete **Part A** and send it with **Part B** to your previous pension provider. You should do this for each scheme you wish to transfer benefits from.

### **What happens next?**

Your previous provider will give you a transfer value, details of your benefits and discharge forms.

### **What do I do with the transfer details?**

Send everything to Pension Services as soon as you receive it. Include the discharge forms; we will not use them to transfer benefits without your permission.

Some transfer values have a 3 month guarantee and personal pension values change daily, so you must send us a **recent** transfer value (less than 1 month old). If the transfer value has expired, or is not recent, we may ask you for a new value. Your previous provider may charge you for repeat quotes. Do not send us an annual benefit statement – it does not include sufficient transfer details,

Our address is:           Pension Services  
                                  Hampshire County Council  
                                  The Castle  
                                  Winchester  
                                  SO23 8UB

### **What happens next?**

We will send you an estimate of the extra service or pension amount your transfer will provide in the Firefighters' pension scheme.

You must then decide whether or not to go ahead. We cannot advise you. You are recommended to consult an independent financial adviser.

### **What if I want the transfer to go ahead?**

Read the checklist we sent with your estimate. Complete the relevant forms and send them and other documents requested to your previous pension provider.

You must send the forms and other documents to your previous pension provider within any guarantee period, if there is one, to take advantage of the guaranteed value.

### **When the transfer is complete**

We will write to you when we receive payment from your previous scheme, confirming completion of the transfer and include a formal notice of the service or pension amount credited to your police pension account.

### **Can previous pension rights always be transferred?**

In most cases a transfer can be made. The Fire pension scheme cannot accept transfers that would not cover the benefits it is required to provide. We will let you know if this applies to you. The firefighter scheme regulations do not allow us to accept transfers containing pension credits awarded under pension sharing orders.

### **What if I do not have my previous provider's address?**

Write to the Pensions Tracing Service at:

#### **Pension Tracing Service**

The Pension Service

Post Handling Site A

Wolverhampton

WV98 1AF

and tell them as much as you can about your previous scheme or provider.

Find online at:

[www.gov.uk/find-lost-pension](http://www.gov.uk/find-lost-pension)

Telephone: 0800 731 0193

From outside the UK: +44 (0)191 215 4491

Textphone: 0800 731 0176

Monday to Friday, 8am to 6pm

## Transfer form - Part A

Please send this to your previous pension provider with Part B



Firefighter's Pension Scheme  
administered by  
Hampshire Pension Services

Dear Pension Provider

I am considering transferring my pension rights with you into the Firefighters' pension scheme 2015. I have given my details below. Please provide the information requested overleaf, and enclose the discharge forms I will need if I wish the transfer to proceed. Send these to my address with a copy of this form so I can pass them to my new scheme.

### I. Personal details

Title \_\_\_\_\_ First Name \_\_\_\_\_ Surname \_\_\_\_\_

Previous surname (if any) \_\_\_\_\_

Address \_\_\_\_\_

Postcode \_\_\_\_\_

National Insurance number

Date of birth \_\_\_\_ / \_\_\_\_ / \_\_\_\_

### Previous pension scheme

Name of previous scheme \_\_\_\_\_

Name of scheme administrators \_\_\_\_\_

Address \_\_\_\_\_

Postcode \_\_\_\_\_

Membership/policy number \_\_\_\_\_

Dates of membership From \_\_\_\_\_ To \_\_\_\_\_

**Club scheme members only** (See note on page 2)

Please select type of transfer value needed

Club

Non-Club

I consent to the disclosure of any additional information about my pension to Hampshire Pension Services.

Please do not send payment. I will contact you again if I want the transfer to proceed.

Signature: \_\_\_\_\_

Date: \_\_\_\_\_



For information on how we hold and use your data, please visit <https://www.hants.gov.uk/hampshire-services/pensions/fire-rescue/contact-us/privacy-notice-and-disclaimer>



Firefighter's Pension Scheme  
administered by  
Hampshire Pension Services

## Transfer form - Part B

To the Pension Provider

If you can offer a transfer value, please send the information requested below to the member with any discharge forms. Please include the date of the estimate. If the transfer value includes pre 1997 protected rights, you must include GMP details.

### If you are an occupational scheme:

- Service dates on which benefit entitlement is based
- Contracted out employment dates, if different
- Weekly GMP to the leaving date and type of revaluation used, split pre and post 88
- Your PSTR number
- Your ECON and SCON if applicable
- Transfer value, excluding any AVC fund
- Post 1997 protected rights
- Current benefits value
- Details of any pension sharing or earmarking orders

### If you are a personal pension arrangement:

- Dates of membership of the arrangement
- Basis of your HMRC approval
- Your PSTR number
- Your ASCON number
- Transfer value
- Details of any pension sharing or earmarking orders

### About the 2015 Firefighter's scheme (2015 Scheme)

The 2015 scheme is a statutory scheme and became a registered pension scheme on 6 April 2006 in accordance with paragraph (1) of Schedule 36 to the Finance Act 2004.

<b>PSTR number</b>	<b>2015 Firefighters Pension Scheme</b> 00677944RB Sub scheme 00823357RH
<b>ECON</b>	E3900002R
<b>SCON</b>	S2734137M
<b>GMP revaluation</b>	Section 148 orders

<b>Administrator</b>	
Pension Services, Hampshire County Council, The Castle, Winchester; SO23 8UB	Phone: 01962 845588
Please regard this as authority to contact HMRC for confirmation of scheme status or related issues.	